SOPHIA Quick Reference Guide

Administrator & Editor Standard Operating Procedures — a fast, step-by-step reference for managing users, authoring and approving governance documents, and administering SOPHIA.

In this guide

Changing a User’s Permissions

Update an existing user’s Team membership or permission group.

Who: Administrators

Where: Manage Users > Users

1. Go to **Manage Users > Users**
2. Search for the user by name or email
3. Select the "···" menu next to their record and choose **Edit**
4. Update the user's Team(s) and/or Permission Group(s) as required
5. Select **Save**

✎ **NOTE**
The user’s access updates immediately once the change is saved.

Managing Teams

Create, edit, view and delete Teams — these organise users and control which processes and content they can access.

Who: Administrators **Where:** Manage Users > Teams

Creating a Team

- Go to **Manage Users > Teams**
- Select **Create Team**
- Enter the Team name and save

Editing a Team Name

- Go to **Manage Users > Teams**
- Select the "⋯" menu next to the Team and choose **Edit**
- Update the Team name and save

Viewing a Team's users or processes

- Select the "⋯" menu next to the Team Choose **Users** to see members, or **Governance documents** / **Processes** to see assigned content

Deleting a Team

- Select the "⋯" menu next to the Team and choose **Delete**

✎ **NOTE**
Delete is greyed out while a Team still has dependent content — reassign these first.

Deleting / Adding Users to a Team

- Select the "⋯" menu next to the Team and choose **Users**
- To add a user: Select **Add Users**, search for the relevant user and click **Add**
- To remove a user: Click the red user icon with a minus sign next to their name.

Using the AI Assistant (if enabled)

Generate a first-draft process or checklist from an existing document.

Who: Content authors

Where: Manage Content > AI Assistant

1. Go to **Manage Content > AI Assistant**
2. Select **Choose file**
3. Upload your source document (.pdf or .docx — one file at a time)
4. Select **Process** or **Checklist** as desired
5. The AI Assistant generates a draft based on the document content
6. Merge / re-run, or select “Add process/checklist to SOPHIA”
7. Select “Go to process”
8. Edit as needed, then submit the draft through the standard approval workflow

SECTION 4 · CONTENT AUTHORING

Creating a New Governance Document

Create a new policy, guideline or other governance document.

Who: Content authors

Where: Manage Content > Governance Documents

1. Go to **Manage Content > Governance Documents** and select **Create Governance Document**
2. Enter the document Name and upload the Attached Document. This may be your organisations Policy / Procedure Template if you're starting a new document
3. Set the Assigned Teams and Editor Teams
4. Add free-text tags, and set the category dropdowns, to aid searching and classification
5. Set the Risk Level, Author, Owner, and the Review Period and Last Reviewed date (or leave blank and the approved date will be set as the 'last reviewed" date)
6. Configure sharing, download and ‘Uncontrolled when downloaded’ options
7. Add any Relevant Documents, External Links or Linked Process Templates
8. Click **Create**, then you can edit the document on SOPHIA and submit it for approval

Assigned vs Editor Teams

Assigned Teams can view the document; Editor Teams can edit its content.

Risk Level

The clinical or operational risk, used for prioritisation and reporting.

Author vs Owner

Author wrote the document; Owner keeps it current and gets review reminders.

Review Period

Combines with Last Reviewed to set the next review date and the dashboard’s Overdue count.

✎ **NOTE**

Saving keeps the document in Draft; submitting sends it into the active Governance Document Approval Flow.

Editing a Governance Document (Online)

Edit a governance document directly within SOPHIA's built-in editor.

Who: Editors **Where:** Manage Content > Governance Documents

Opening a document

- Go to **Manage Content > Governance Documents** and find the document
- Select the "⋯" menu next to the row and choose **Edit**, then click on the **Edit Document** tab

Editing, reviewing and sharing

- Use the **Home** tab for formatting — use Heading styles for all section titles
- Use the **Insert** tab for tables, images, comments, links, headers/footers and page numbers
- Select **Save** once you're happy with your changes
- Use the **Review** tab to add and resolve comments, and to step through tracked changes
- Select **Share to Edit** to send reviewers a link for direct edits or comments

Finalising and submitting

- Resolve all comments and review tracked changes
- In the **Approval** tab, set the right approvers and compliance approvers
- Select **Send for Approval** — designated approvers are notified within SOPHIA
- The document publishes automatically once all approvers have signed off

✎ **NOTE**
Track Changes is always on — every edit is automatically recorded against your name and this cannot be turned off.

Editing a Governance Document (Offline)

Edit a document’s source file outside SOPHIA (e.g. desktop Word) and update it in the platform.

Who: Editors **Where:** Governance Document > Set up tab

1. Open the governance document and select the **Set up** tab
2. Under **Attached Document**, download the current file
3. Edit the file offline in the appropriate desktop application
4. Return to the Set up tab and select **Replace** next to Attached Document
5. Upload the edited file and save the document
6. Submit the document for approval once editing is complete

Linking Content

Link related documents and processes so users can navigate directly between them.

Who: Content authors

Where: Governance Document > Set up tab

1. Open the governance document and select the **Set up** tab
2. Scroll to **Linked Process Templates**
3. Select “Select process templates…” and choose the relevant process(es) or checklist(s)
4. Save the document

Approving / Publishing Documents

Review, approve or reject a governance document submitted through an Approval Flow.

Who: Assigned approvers **Where:** Governance Documents dashboard

Reviewing

- Open the document from "Pending Your Approval" on the dashboard (via Review on the ··· menu), or from an email notification
- Select the **Approval** tab to see the current workflow step and status, and the approval history
- Select the **Edit Document** tab if you need to review or amend content before deciding

Approving

- Select **Approve**
- Add optional comments for the next approver or the audit log, then confirm
- Choose to reset the review cycle from today, or maintain the existing scheduled date
- The document moves to the next step, or publishes if it was the final step. At the compliance check step, only one approver is required to move to the next step.

Rejecting

- Select the option to reject
- Add a comment explaining the reason
- The document returns to Draft for the author to amend and resubmit

Archiving Content

Archive a governance document or process, and restore archived content.

Who: Content authors / Administrators

Where: Manage Content > Archive

Archiving an item

- Locate the document or process in its list view
- Select the "···" menu next to the item and choose **Request archival**
- Add reason for request and select **Submit request**
- The item moves to **Manage Content > Archive** once archival request is approved

Restoring an archived item

- Go to **Manage Content > Archive**
- Select the **Processes** or **Governance Documents** tab and search for the item
- Select **Unarchive** in the Actions column to restore it to the active list

Viewing an archived item

- Go to **Manage Content > Archive**
- Select the **Processes** or **Governance Documents** tab and search for the item
- Select **Versions** in the Actions column to see previous versions (clicking on the eye icon) or **View** to see the document and details or download the file

The Cross-Organisations Library

Browse and use processes and checklists shared by other organisations on SOPHIA.

Who: Users with library access

Where: Manage Content > Cross-Organisations Library

1. Go to **Manage Content > Cross-Organisations Library**
2. Select the **Governance Documents** or **Processes** tab
3. Use the search bar to find content by name from organisations using SOPHIA
4. Tick “Following only” to see items you follow
5. Use the organisation filter to narrow to a specific organisation — this unlocks that organisation’s category filter
6. Review results — Organisation, Status, Categories, Version and Last Reviewed date
7. You can **View**, **Copy to your organisation** (as a draft), or **Follow** an item. If you follow an item, you'll receive an email alert when a new version is published

Generating Permalinks

Generate a shareable link to a governance document, in view mode or content management mode.

Who: Users with view or edit access

Where: Governance Document viewer

1. Open the published document
2. Select “Share to view” in the top right
3. Choose “With my organisation” for an internal-only link, or “Share publicly” if enabled by the author
4. Copy the generated link to share as needed

Accessing Older Versions

View the version history of a governance document.

Who: Users with view access
Where: Governance Documents

1. Go to **Governance Documents** and locate the document
2. Select the "⋯" menu next to the document
3. Choose **Versions**
4. The Version History screen lists every version, who created it and the date
5. Select the eye icon next to any version to view its content

Administrator Handbook

A consolidated checklist and reference point for SOPHIA Administrators.

Who: Administrators / Super Admins

Where: Manage Content & Manage Users

Categories

Manage Content > Categories controls the classification fields (e.g. Area, Document Type, Committee) available when creating documents. Review Field Names, Applies To and Selection Type before adding new ones. Use "Key category" to flag fields shown to end users next to search. Save before navigating away.

Approval Flows

Manage Content > Approval Flows controls which workflow applies to new submissions, separately for Process/Checklist and Governance Document types. Only one flow per document type can be active at a time — confirm which roles are assigned to each step before activating, then Save.

Permission Groups

Review existing Permission Groups (e.g. Document Editors, Org-level Data, Process Editors, Content Users) under **Manage Users > Permission Groups**, and confirm what each group allows before assigning it to a user.